

Introduction

Thank you for attending the Direct Ship/Formula training webinar. My name is Mike Bonnett and today we will be discussing the difference between Direct Ship of formula and Issuing Formula from Stock. We will discuss some rules for Direct Ship and Issuing from Stock, review scenarios for Direct Ship and Issuing Formula from Stock, and I will answer any questions you may have.

First, a Direct Ship Formula is a special formula that is ordered by the state, sent to your agency and then picked up by the participant. Issuing formula from your inventory can be any kind of formula that is given to the participant out of your stock. Both of these will use the same Direct Ship option which we will look at in the scenarios below.

Next let's discuss a few rules to keep in mind when working with Direct Ship of formula.

1. Call the State Office and speak to the formula approval Nutritionist and place order for formula. **(This must be done first). (DO NOT issue Direct Ships in MOWINS at this point).**
2. Scan the WIC-27 Medical Documentation into MOWINS.
3. Make note in General Notes on participant record of the date formula ordered, what formula was ordered, how much formula was ordered, and any special instructions.
4. Wait for order to be delivered to the WIC office. Once received call participant and set up time for pick up.
5. On the day the participant comes to pick up the formula, assure that Food Package III is verified. If necessary, also update the Date Breastfeeding Verified.
6. Create the Food Rx for the formula and the quantity that will be distributed.
7. Go to Issue Benefits, since this is a direct ship be sure to select the Direct Ship box, and issue the direct ship benefit. No actual check will print but it will show in the Benefits History.
8. Have the participant sign the signature pad. Participant is signing that they received the formula from you.
9. If the LDTU has passed, do not give the formula to the participant.
10. Only check the Direct Ship box if you are giving a participant cans of formula.

Let's look at 3 different scenarios for Direct Ship, (Formula Only, Food and Formula, Out of Stock formula, and Direct Ship formula).

The **first scenario** we will look at is for a participant who is receiving Direct Ship Formula only.

In this scenario we have already called the Formula Approval Nutritionist and have scanned the WIC-27.

So on the day I called the Nutritionist I created a General Note as seen below.

The screenshot shows a window titled "Manage Notes" with a close button (X) in the top right corner. Below the title bar is a "Display" section with four checkboxes: "SOAP Notes", "General Notes", "BF Notes", and "System Notes", all of which are checked. To the right of these checkboxes is a "Refresh" button. Below the "Display" section is a section titled "Notes for Household Member" containing a table with four columns: "Note Type", "Date Created", "Application Area", and "Staff Member". The table has two rows of data. Below the table is a large text area labeled "Selected Note Text" which contains the text: "On 10/1/13 69 6 packs of Enfamil Non-Premature (24cal) RTU was ordered." At the bottom of the window is a row of buttons: "Full Page View", "Create SOAP Note", "Create General Note", "Create BF Note", "Print Note", and "Close".

Note Type	Date Created	Application Area	Staff Member
General	10/14/2013	Food Prescription	WMOCMHD
General	10/14/2013	Food Prescription	WMOCMHD

Selected Note Text

On 10/1/13 69 6 packs of Enfamil Non-Premature (24cal) RTU was ordered.

Full Page View Create SOAP Note Create General Note Create BF Note Print Note Close

I received the formula into my agency and called the participant setting an appointment for them to come pick it up.

When the participant arrived I went into the Health Information screen and verified the Food Pkg III date as today's date.

PF - BABY NEWBIE - 2 Months 20 Days - WIC ID: 00909342 - HH ID: 00594853

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History

Demographics	Immunization	HT/WT/Blood	Food Prescription	Risk Factors	Nutrition Assessment
Health Information	Nutrition Education	Referrals	Income History	Benefits History	Appointments

Birth Information

Unknown Birth Criteria ☐

Birth Height 20 In 1 8ths Birth Weight 8 Lbs 10 Ozs

Gestation Weeks 40

Birth Facility HOSPITAL

Mother's Information

Birth Date 3/25/1985 ☒ On WIC

State WIC Information ***One-Way Link***
ID 00909343 Name JANE D. NEWBIE

Feeding Information

Ever Breastfed
☒ Yes ☐ No ☐ Unknown

☒ Requires Food Package III

☒ Breastfeeding Now

Breastfeeding Amount Partially BF > Max

Reason(s) Stopped
Low milk supply
Returned to work or school
Hospital/healthcare provider
Mom met personal goal/personal preference

Date Food Package III Verified 10/14/2013

Date Breastfeeding Verified 10/14/2013

Date Breastfeeding Began

Date Breastfeeding Ended

Date Supplemental Feeding Began

Date Solids Were Introduced

Medical Conditions

☐ Diabetes Mellitus ☐ Hypertension or Prehypertension

10/14/2013 2:56 PM

Now I can create the Food Rx in MOWINS.

PF - BABY NEWBIE - 2 Months 20 Days - WIC ID: 00909342 - HH ID: 00594853

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History

Health Information	Nutrition Education	Referrals	Income History	Benefits History	Appointments
Demographics	Immunization	HT/WT/Blood	Food Prescription	Risk Factors	Nutrition Assessment

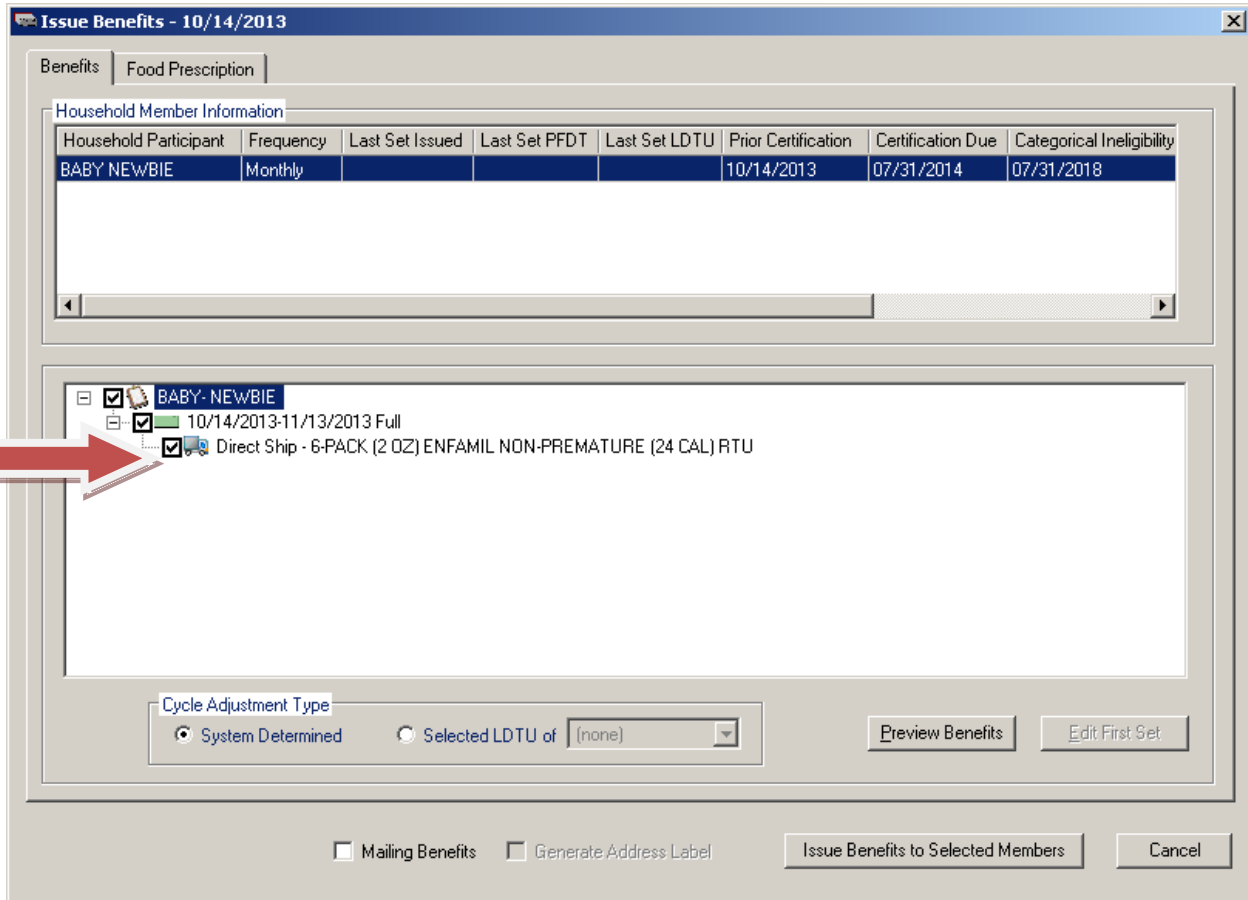
Food Prescriptions

- Food Prescription for Certification
 - Rx** 10/14/2013
 - 69 - 6-PACK (2 OZ) ENFAMIL NON-PREMATURE (24CAL) RTU
 - Rx** SPECIAL RX: 10/14/2013 - 04/15/2014

Add... Edit... Delete

10/14/2013 2:58 PM

Once the Food Rx is entered we can now Issue the benefits. Since the participant is here and we are giving them the 69 packs of formula we can select the direct ship box. The only time this box should be checked is when we are actually giving formula to a participant.



The screenshot shows the 'Issue Benefits' window for the date 10/14/2013. It has two tabs: 'Benefits' and 'Food Prescription'. The 'Household Member Information' section contains a table with the following data:

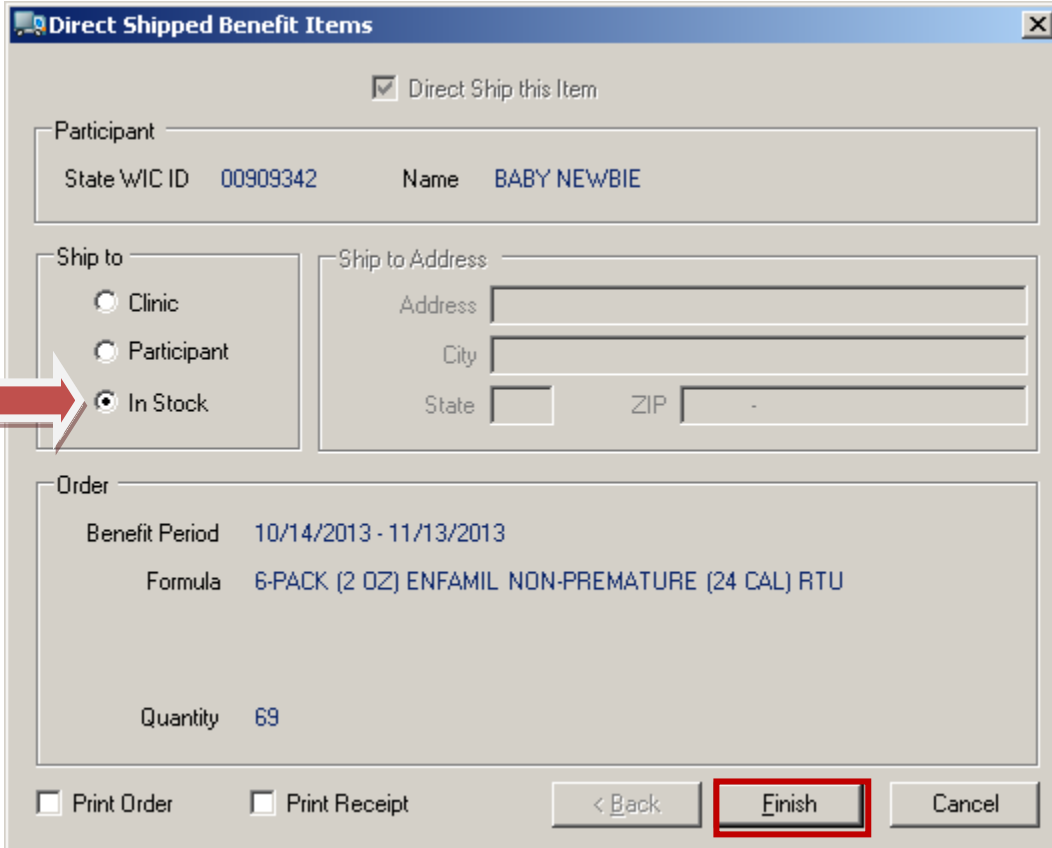
Household Participant	Frequency	Last Set Issued	Last Set PFDT	Last Set LDTU	Prior Certification	Certification Due	Categorical Ineligibility
BABY NEWBIE	Monthly				10/14/2013	07/31/2014	07/31/2018

Below the table, a list of benefits for 'BABY-NEWBIE' is shown. A red arrow points to the 'Direct Ship' checkbox, which is currently unchecked. The list includes:

- ☒ BABY-NEWBIE
- ☒ 10/14/2013-11/13/2013 Full
- ☐ Direct Ship - 6-PACK (2 OZ) ENFAMIL NON-PREMATURE (24 CAL) RTU

At the bottom, there is a 'Cycle Adjustment Type' section with two radio buttons: 'System Determined' (selected) and 'Selected LDTU of' (none). To the right are buttons for 'Preview Benefits' and 'Edit First Set'. At the very bottom, there are checkboxes for 'Mailing Benefits' and 'Generate Address Label', and buttons for 'Issue Benefits to Selected Members' and 'Cancel'.

Once you have Previewed the Benefits and Select Issue Benefits to Selected Members, a Direct Ship screen will pop up (since you selected the direct ship box). Be sure to Select In Stock on the Ship To and then you can hit Finish.



The image shows a software window titled "Direct Shipped Benefit Items". At the top, there is a checkbox labeled "Direct Ship this Item" which is checked. Below this, the "Participant" section displays "State WIC ID 00909342" and "Name BABY NEWBIE". The "Ship to" section has three radio button options: "Clinic", "Participant", and "In Stock". A red arrow points to the "In Stock" option, which is selected. To the right of these options is the "Ship to Address" section with fields for "Address", "City", "State", and "ZIP". The "Order" section at the bottom shows "Benefit Period 10/14/2013 - 11/13/2013", "Formula 6-PACK (2 OZ) ENFAMIL NON-PREMATURE (24 CAL) RTU", and "Quantity 69". At the very bottom, there are checkboxes for "Print Order" and "Print Receipt", and three buttons: "< Back", "Finish" (which is highlighted with a red rectangle), and "Cancel".

☒ Direct Ship this Item

Participant

State WIC ID 00909342 Name BABY NEWBIE

Ship to

☐ Clinic

☐ Participant

☒ In Stock

Ship to Address

Address

City

State ZIP

Order

Benefit Period 10/14/2013 - 11/13/2013

Formula 6-PACK (2 OZ) ENFAMIL NON-PREMATURE (24 CAL) RTU

Quantity 69

☐ Print Order ☐ Print Receipt

< Back **Finish** Cancel

No Checks will print, but the participant must sign that they are receiving the formula.

Capture Electronic Signature

Please capture the authorized signature for the following participants.

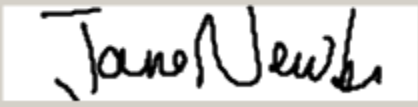
Participants and Benefits

Participants

- BABY NEWBIE 00909342
- 10/14/2013 - 11/13/2013 Benefits:34238931 - 34238931

This signature indicates that they have received all of the benefits that are listed above.

Authorized Signature

Signature: 

Capture Electronic Signature

Save Signature Cancel

Now let's view the Benefit History. As you can see there is a benefit showing Direct Shipped.

The screenshot shows a software window titled "PF - BABY NEWBIE - 2 Months 20 Days - WIC ID: 00909342 - HH ID: 00594853". The menu bar includes "File", "Participant Activities", "Certification", "Benefit Management", "Document Imaging", and "Help". Below the menu is a toolbar with various icons. A tabbed interface is visible with the following tabs: "Certification History", "Demographics", "Immunization", "HT/WT/Blood", "Food Prescription", "Risk Factors", "Nutrition Assessment", "Health Information", "Nutrition Education", "Referrals", "Income History", "Benefits History" (which is selected and highlighted with a dotted border), and "Appointments".

The "Benefits History" section contains a tree view under the heading "Benefits". It shows a list of benefits with the following details:

- 34238931 FDTU: 10/14/2013 - LDTU: 11/13/2013 Printed FDTU: 10/14/2013 Agency 620 Clinic 03 -- Direct Shipped
- 69.00 6-PACK (2 OZ) ENFAMIL NON-PREMATURE (24 CAL) RTU

A large red arrow points from the right side of the screen towards the "Direct Shipped" text in the benefit entry.

At the bottom of the window, there are three buttons: "Print Order", "Print Receipt", and "Show Details". The status bar at the bottom right displays the date and time: "10/14/2013 3:07 PM".

The **next scenario** is when we have food and formula being issued to the participant.

Again, we have already called the State Nutritionist and have scanned in the WIC-27.

But in this scenario we can issue the Food items to the client today & then later add the formula.

The first thing we would do is create the Food Rx for the food items only. Notice the formula is NOT on the Rx.

The screenshot displays a software window titled "PF - ORANGE Y. PUMPKIN - 2 Years 7 Months 19 Days - WIC ID: 00909344 - HH ID: 00594854". The interface includes a menu bar with "File", "Participant Activities", "Certification", "Benefit Management", "Document Imaging", and "Help". Below the menu is a toolbar with various icons. A grid of buttons is visible, including "Certification History", "Health Information", "Demographics", "Nutrition Education", "Immunization", "Referrals", "HT/WT/Blood", "Income History", "Food Prescription", "Benefits History", "Risk Factors", "Appointments", and "Nutrition Assessment". The "Food Prescription" button is selected, opening a "Food Prescriptions" panel. This panel shows a "Food Prescription for Certification" for the date "10/14/2013". The prescription list includes: "16 - QUARTS SKIM THRU 2% MILK (WHITE)", "1 - DOZEN EGGS LARGE, WHITE", "36 - OUNCES CEREAL APPROVED TYPES/SIZES", "2 - 16 OZ WIC APPROVED BREAD, TORTILLAS OR BROWN RICE", "1 - 1 LB DRY BEANS OR 4-16 OZ CAN BEANS OR 1-18 OZ PEANUT BUTTER", "600 - FOR FRESH/FROZEN FRUITS OR VEGETABLES", and "2 - 64 FL OZ CONTAINER JUICE APPROVED BRANDS AND TYPES". At the bottom of the panel are "Add...", "Edit...", and "Delete" buttons. The system clock in the bottom right corner shows "10/14/2013 3:18 PM".

Food Prescription for Certification
10/14/2013
16 - QUARTS SKIM THRU 2% MILK (WHITE)
1 - DOZEN EGGS LARGE, WHITE
36 - OUNCES CEREAL APPROVED TYPES/SIZES
2 - 16 OZ WIC APPROVED BREAD, TORTILLAS OR BROWN RICE
1 - 1 LB DRY BEANS OR 4-16 OZ CAN BEANS OR 1-18 OZ PEANUT BUTTER
600 - FOR FRESH/FROZEN FRUITS OR VEGETABLES
2 - 64 FL OZ CONTAINER JUICE APPROVED BRANDS AND TYPES

I can issue these benefits now.

Issue Benefits - 10/14/2013

Benefits | Food Prescription

Household Member Information

Household Participant	Frequency	Last Set Issued	Last Set PFD T	Last Set LDTU	Prior Certification	Certification Due	Categorical Ineligibility
ORANGE Y PUMPKIN	Monthly				10/14/2013	02/28/2014	02/29/2016

ORANGE-Y PUMPKIN

10/14/2013-11/13/2013 Full

Cycle Adjustment Type

☒ System Determined ☐ Selected LDTU of (none)

Preview Benefits Edit First Set

☐ Mailing Benefits ☐ Generate Address Label

Issue Benefits to Selected Members Cancel

This will allow the client to use the food benefits and not have to wait for the formula to arrive.

You will still need to make a General Note about the formula.

The "Manage Notes" window displays a table of notes for a household member. The table has four columns: Note Type, Date Created, Application Area, and Staff Member. The first row shows a General note created on 10/14/2013 for Food Prescription by staff member WMOCMHD. Below the table is a text area for the selected note, which contains the text: "on 10/1/13 ordered 27 4 packs of Boost Kid essentials all flavors rtu". The window also includes a "Display" section with checkboxes for SOAP Notes, General Notes, BF Notes, and System Notes, and a "Refresh" button. At the bottom are buttons for "Full Page View", "Create SOAP Note", "Create General Note", "Create BF Note", "Print Note", and "Close".

Note Type	Date Created	Application Area	Staff Member
General	10/14/2013	Food Prescription	WMOCMHD

Selected Note Text

on 10/1/13 ordered 27 4 packs of Boost Kid essentials all flavors rtu

Full Page View Create SOAP Note Create General Note Create BF Note Print Note Close

Once the formula arrives and the participant comes in to pick up the formula you will verify Food Pkg III setting it to the current date.

PF - ORANGE Y. PUMPKIN - 2 Years 7 Months 19 Days - WIC ID: 00909344 - HH ID: 00594854

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History

Demographics	Immunization	HT/AWT/Blood	Food Prescription	Risk Factors	Nutrition Assessment
Health Information	Nutrition Education	Referrals	Income History	Benefits History	Appointments

Birth Information

Unknown Birth Criteria ☐

Birth Height 19 In 0 8ths Birth Weight 6 Lbs 2 Ozs

Gestation Weeks 39

Birth Facility HOSPITAL

Mother's Information

Birth Date ☐ On WIC

State WIC Information

ID N/A Name N/A

Feeding Information

Ever Breastfed

☐ Yes ☒ No ☐ Unknown

☒ Requires Food Package III Date Food Package III Verified 10/14/2013

☐ Breastfeeding Now

Breastfeeding Amount Not Applicable

Reason(s) Stopped

Low milk supply

Returned to work or school

Hospital/healthcare provider

Mom met personal goal/personal preference

Date Breastfeeding Verified

Date Breastfeeding Began

Date Breastfeeding Ended

Date Supplemental Feeding Began 2/25/2011

Date Solids Were Introduced

Medical Conditions

☐ Diabetes Mellitus ☐ Hypertension or Prehypertension

10/14/2013 3:58 PM

Then you will create a Food Rx for the formula only using the date they are picking up the formula.

PF - ORANGE Y. PUMPKIN - 2 Years 7 Months 19 Days - WIC ID: 00909344 - HH ID: 00594854

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History

Health Information Nutrition Education Referrals Income History Benefits History Appointments

Demographics Immunization HT/AWT/Blood Food Prescription Risk Factors Nutrition Assessment

Food Prescriptions

- Food Prescription for Certification
 - 10/14/2013
 - 27 - 4 PACK (8.25 OZ) BOOST KID ESSENTIALS ALL FLAVORS RTU
 - SPECIAL RX: 10/14/2013 - 02/28/2014

Add... Edit... Delete

10/14/2013 4:00 PM

Since we have already issued them food benefits we will need to use the Add/Replace option through the Benefit Management menu. You then need to check the date of the checks that the formula should be issued for. Check the box if correct. You will then select the OK button.

Add/Replace Set of Benefits

☐ Add Set (for Late Scheduling of Subsequent Certification Appointment)

☐ Replace Set (for Food Prescription Change)

[Edit Food Prescription](#)

An additional set of benefits cannot be issued to this participant because valid benefits are still available for the participant through Issue Benefits.

Currently Outstanding Set of Benefits

Select	Actual First Date to	Last Date To Use	Participation Month.
<input checked="" type="checkbox"/>	10/14/2013	11/13/2013	10/2013

Note

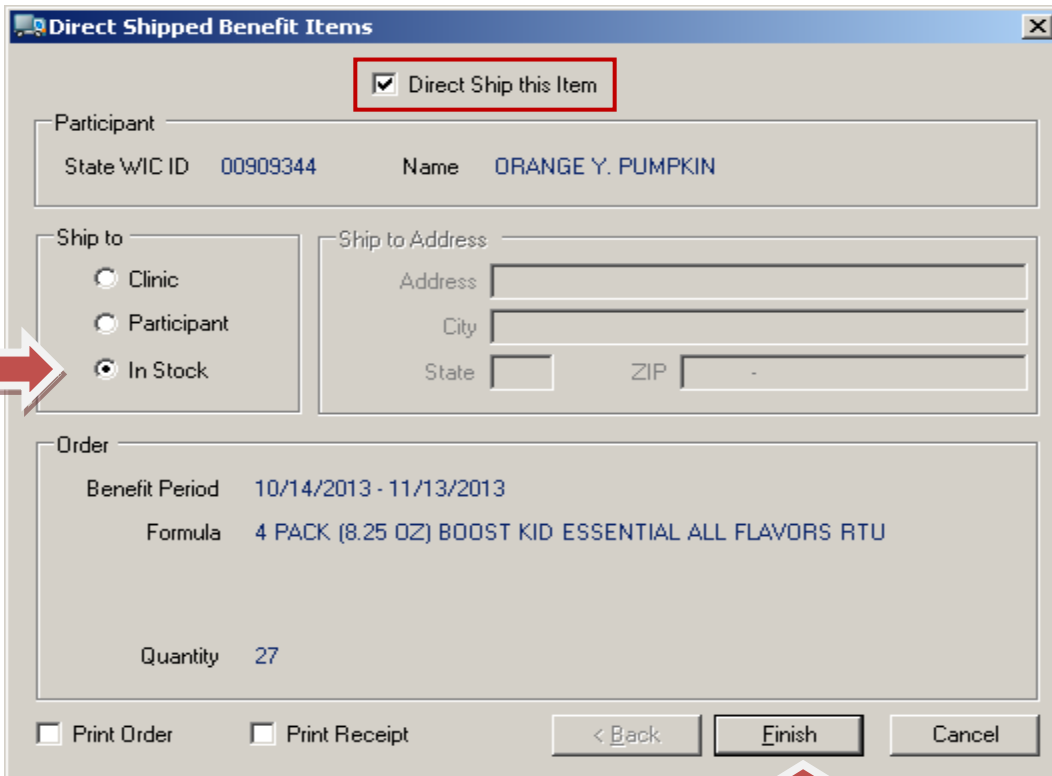
Direct ship formula pick up for Oct

☐ Mailing Benefits ☐ Generate Address Label

OK Cancel

Once OK is selected the Direct Shipped Benefit Items screen appears.

On this screen you will need to check the Direct Ship this Item box and the be sure to select In Stock from the Ship to Option.



The screenshot shows a software window titled "Direct Shipped Benefit Items". At the top, there is a checkbox labeled "Direct Ship this Item" which is checked and highlighted with a red rectangle. Below this is a "Participant" section containing "State WIC ID" (00909344) and "Name" (ORANGE Y. PUMPKIN). The "Ship to" section has three radio button options: "Clinic", "Participant", and "In Stock". A red arrow points to the "In Stock" option. To the right of these options is a "Ship to Address" section with input fields for "Address", "City", "State", and "ZIP". The "Order" section at the bottom contains "Benefit Period" (10/14/2013 - 11/13/2013), "Formula" (4 PACK (8.25 OZ) BOOST KID ESSENTIAL ALL FLAVORS RTU), and "Quantity" (27). At the very bottom are checkboxes for "Print Order" and "Print Receipt", and three buttons: "< Back", "Finish", and "Cancel". A red arrow points to the "Finish" button.

Now you can select Finish.

The Participant then has to sign that they are receiving the formula

The screenshot shows a software window titled "Capture Electronic Signature". Inside, there is a section labeled "Participants and Benefits" which contains a tree view. The tree view has a root node "Participants" with a sub-node "ORANGE Y PUMPKIN 00909344". Below this sub-node, it lists a date range "10/14/2013 - 11/13/2013" and benefit numbers "Benefits: 34238937 - 34238937". Below this section, a text label states: "This signature indicates that they have received all of the benefits that are listed above." Underneath this is another section labeled "Authorized Signature". It contains a label "Signature:" followed by a white rectangular box where a handwritten signature "Rita Pumpkin" is visible. Below the signature box is a button labeled "Capture Electronic Signature". At the bottom of the window are two buttons: "Save Signature" and "Cancel".

Capture Electronic Signature


Please capture the authorized signature for the following participants.

Participants and Benefits

- Participants
 - ORANGE Y PUMPKIN 00909344
 - 10/14/2013 - 11/13/2013 Benefits: 34238937 - 34238937

This signature indicates that they have received all of the benefits that are listed above.

Authorized Signature

Signature: 

Capture Electronic Signature

Save Signature **Cancel**

Now when we look at the Benefit History the Direct Ship shows.

PF - ORANGE Y. PUMPKIN - 2 Years 7 Months 19 Days - WIC ID: 00909344 - HH ID: 00594854

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History

Demographics	Immunization	HT/WT/Blood	Food Prescription	Risk Factors	Nutrition Assessment
Health Information	Nutrition Education	Referrals	Income History	Benefits History	Appointments

Benefits History

- 34238932 FDTU: 10/14/2013 - LDTU: 11/13/2013 Printed FDTU: 10/14/2013 Agency 620 Clinic 03
 - 1.00 GALLONS MILK:SKIM THRU 2% (WHITE)
 - 36.00 OUNCES CEREAL - APPROVED TYPES/SIZES
 - 1.00 16 OZ WIC APPROVED BREAD, TORTILLAS OR BROWN RICE
 - 1.00 64 OZ CONTAINER JUICE APPROVED BRANDS & TYPES
- 34238933 FDTU: 10/14/2013 - LDTU: 11/13/2013 Printed FDTU: 10/14/2013 Agency 620 Clinic 03
- 34238934 FDTU: 10/14/2013 - LDTU: 11/13/2013 Printed FDTU: 10/14/2013 Agency 620 Clinic 03
- 34238935 FDTU: 10/14/2013 - LDTU: 11/13/2013 Printed FDTU: 10/14/2013 Agency 620 Clinic 03
- 34238936 FDTU: 10/14/2013 - LDTU: 11/13/2013 Printed FDTU: 10/14/2013 Agency 620 Clinic 03
 - 600.00 FOR FRESH/FROZEN FRUITS OR VEGETABLES
- 34238937 FDTU: 10/14/2013 - LDTU: 11/13/2013 Printed FDTU: 10/14/2013 Agency 620 Clinic 03 -- Direct Shipped
 - 27.00 4 PACK (8.25 OZ) BOOST KID ESSENTIAL ALL FLAVORS RTU

Print Order Print Receipt Show Details

10/14/2013 4:07 PM

Scenario 3 is when the agency is ordering Direct Ship Formula but also has some of that formula in stock.

In this scenario we will be issuing 11 cans of Enfacare Powder to the client. We currently have 5 cans of that formula in our inventory and are going to give those 5 cans to mom and then have 6 direct shipped.

First thing to do is Verify the Food Pkg III date.

The screenshot shows a WIC software interface for a participant named "PF - 8 Months 6 Days - WIC ID:". The interface includes a menu bar (File, Participant Activities, Certification, Benefit Management, Document Imaging, Help) and a toolbar with various icons. The main content area is divided into several sections:

- Birth Information:** Includes fields for Unknown Birth Criteria, Birth Height (19 In 0 8ths), Birth Weight (7 Lbs 9 Ozs), Birth Facility (HOSPITAL), and Gestation (38 Weeks 3 Days).
- Mother's Information:** Includes Birth Date (8/16/1977), On WIC status, and State WIC Information (Two-Way Link).
- Feeding Information:** This section is highlighted. It includes:
 - Ever Breastfed: Yes (selected), No, Unknown.
 - Requires Food Package III: Checked.
 - Breastfeeding Now: Unchecked.
 - Breastfeeding Amount: Not Applicable.
 - Reason(s) Stopped: Low milk supply, Returned to work or school (selected), Hospital/healthcare provider, Mom met personal goal/personal preference.
 - Date Food Package III Verified: 10/14/2013 (highlighted by a red arrow).
 - Date Breastfeeding Verified: 5/24/2013.
 - Date Breastfeeding Began: 2/8/2013.
 - Date Breastfeeding Ended: 5/10/2013.
 - Date Supplemental Feeding Began: 2/8/2013.
 - Date Solids Were Introduced: (empty).
- Medical Conditions:** Includes checkboxes for Diabetes Mellitus and Hypertension or Prehypertension.

The status bar at the bottom right shows the date and time: 10/14/2013 4:24 PM.

Next we are going to create a food Rx for today's date for the 5 cans we are giving off of our shelf.

PF - 8 Months 6 Days - WIC ID:

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History

Health Information Nutrition Education Referrals Income History Benefits History Appointments

Demographics Immunization HT/A/T/Blood Food Prescription Risk Factors Nutrition Assessment

Food Prescriptions

- Food Prescription for Certification
- 02/08/2014
- 10/14/2013
- 5 - 12.8 OZ ENFACARE PwD
- 08/08/2013
- 06/08/2013
- 05/24/2013
- 03/20/2013
- 03/08/2013
- 02/19/2013

Add... Edit... Delete

10/14/2013 4:25 PM

Now we can issue benefits. Since we are giving 5 cans off of the shelf we need to select the direct ship box for those 5 cans.

Issue Benefits - 10/14/2013

Benefits | Food Prescription

Household Member Information

Household Participant	Frequency	Last Set Issued	Last Set PFDT	Last Set LDTU	Prior Certification	Certification Due	Categorical Ineligibility
[Redacted]	Tri-monthly			05/31/2013	02/19/2013	05/31/2013	05/31/2013
	Bi-monthly			08/31/2013	02/19/2013	08/31/2013	02/29/2016
	Bi-monthly			08/31/2013	02/19/2013	08/31/2013	08/31/2013
	Bi-monthly	7/15/2013	8/1/2013	08/31/2013	02/19/2013	02/28/2014	02/28/2018

Tree View:

- ☒ <10/1/2013>10/14/2013-10/31/2013 Full
 - ☒ Direct Ship - 12.8 OZ ENFACARE PWD
- ☐ 11/7/2013-11/30/2013 Full
 - ☐ Direct Ship - 12.8 OZ ENFACARE PWD

Cycle Adjustment Type

☒ System Determined ☐ Selected LDTU of [none]

Preview Benefits Edit First Set

☐ Mailing Benefits ☐ Generate Address Label

Issue Benefits to Selected Members Cancel

Select to Issue Benefits.

The Direct Shipped Benefit Items screen displays. Select In Stock in the Ship to area and click Finish.

The screenshot shows a software window titled "Direct Shipped Benefit Items". At the top, there is a checkbox labeled "Direct Ship this Item" which is checked. Below this is a "Participant" section with two text input fields: "State WIC ID" and "Name". The "Ship to" section contains three radio buttons: "Clinic", "Participant", and "In Stock". A red arrow points to the "In Stock" radio button. To the right of the radio buttons is a "Ship to Address" section with three text input fields: "Address", "City", and "State". The "ZIP" field is also present but contains a hyphen. Below the address fields is an "Order" section containing the following information: "Benefit Period 10/01/2013 - 10/31/2013", "Formula 12.8 OZ ENFACARE PWD", and "Quantity 5". At the bottom of the window are two checkboxes, "Print Order" and "Print Receipt", both of which are unchecked. To the right of these checkboxes are three buttons: "< Back", "Finish", and "Cancel". A red arrow points to the "Finish" button.

☒ Direct Ship this Item

Participant

State WIC ID Name

Ship to

☐ Clinic

☐ Participant

☒ In Stock

Ship to Address

Address

City

State ZIP

Order

Benefit Period 10/01/2013 - 10/31/2013

Formula 12.8 OZ ENFACARE PWD

Quantity 5

☐ Print Order ☐ Print Receipt

< Back Finish Cancel

Be sure to have the Participant sign for the formula.

The image shows a software window titled "Capture Electronic Signature". At the top, it says "Please capture the authorized signature for the following participants." Below this is a section titled "Participants and Benefits" which contains a tree view. The tree view has a root node "Participants" with a sub-node containing a person icon, a date range "10/14/2013 - 10/31/2013", and benefit numbers "Benefits:34238938 - 34238938". Below the tree view, a text line reads "This signature indicates that they have received all of the benefits that are listed above." The bottom section is titled "Authorized Signature" and contains a label "Signature:" next to a large empty rectangular box. Below this box is a button labeled "Capture Electronic Signature". At the very bottom of the window are two buttons: "Save Signature" and "Cancel".

Capture Electronic Signature

Please capture the authorized signature for the following participants.

Participants and Benefits

- Participants
 - 10/14/2013 - 10/31/2013 Benefits:34238938 - 34238938

This signature indicates that they have received all of the benefits that are listed above.

Authorized Signature

Signature:

Capture Electronic Signature

Save Signature Cancel

Now you will want to make a General Note stating that 5 cans were given out of your inventory and 6 cans have been ordered as Direct Ship.

The screenshot shows a software window titled "Manage Notes". At the top, there is a "Display" section with four checkboxes: "SOAP Notes", "General Notes", "BF Notes", and "System Notes", all of which are checked. A "Refresh" button is located to the right of these checkboxes. Below this is a section titled "Notes for Household Member" containing a table with four columns: "Note Type", "Date Created", "Application Area", and "Staff Member". The table lists four notes, with the first one highlighted in blue. Below the table is a section titled "Selected Note Text" which contains a text area with the following text: "On 10/14/13 participant had WIC 27 for 11 cans of Enfacare PWD, we gave five cans out of our inventory and ordered the other 6 for direct ship." At the bottom of the window, there is a row of buttons: "Full Page View", "Create SOAP Note", "Create General Note" (which is highlighted), "Create BF Note", "Print Note", and "Close".

Note Type	Date Created	Application Area	Staff Member
General	10/14/2013	Food Prescription	WMOCMHD
General	07/15/2013	Nutrition Education	GUDERJ
General	05/24/2013	Nutrition Education	MCBRIC2
General	03/20/2013	Nutrition Education	GUDERJ

Selected Note Text

On 10/14/13 participant had WIC 27 for 11 cans of Enfacare PWD, we gave five cans out of our inventory and ordered the other 6 for direct ship.

Full Page View Create SOAP Note Create General Note Create BF Note Print Note Close

When the participant comes in to pick up the direct ship you will update the food pkg III date, and then create a Food Rx for the amount of the remaining formula.

The screenshot shows a software window titled "PF - 8 Months 6 Days - WIC ID:". The window has a menu bar with "File", "Participant Activities", "Certification", "Benefit Management", "Document Imaging", and "Help". Below the menu bar is a toolbar with various icons. The main area is divided into several tabs: "Certification History", "Health Information", "Nutrition Education", "Referrals", "Income History", "Benefits History", "Appointments", "Demographics", "Immunization", "HT/WT/Blood", "Food Prescription", "Risk Factors", and "Nutrition Assessment". The "Food Prescription" tab is selected, and the "Food Prescriptions" window is open. This window shows a list of food prescriptions for certification, including dates and quantities of various food items. The "Add..." button is highlighted.

Date	Food Prescription
02/08/2014	16 - QUARTS WHOLE MILK (WHITE/UNFLAVORED) 1 - DOZEN EGGS LARGE, WHITE 36 - OUNCES CEREAL APPROVED TYPES/SIZES 2 - 16 OZ WIC APPROVED BREAD, TORTILLAS OR BROWN RICE 1 - 1 LB DRY BEANS OR 1-18 OZ PEANUT BUTTER OR 4-16 OZ CAN BEANS 600 - FOR FRESH/FROZEN FRUITS OR VEGETABLES 2 - 64 FL OZ CONTAINER JUICE APPROVED BRANDS AND TYPES
10/15/2013	6 - 12.8 OZ ENFACARE PWD
10/14/2013	
08/08/2013	
06/08/2013	
05/24/2013	
03/20/2013	
03/08/2013	
02/19/2013	

Buttons: Add... Edit... Delete

10/14/2013 4:34 PM

Again, since we have already issued benefits once we will need to go to Add/Replace in the Benefit Management menu.

You will want to select the correct benefit set. If the benefits have Expired you do NOT give the formula to the participant.

Add/Replace Set of Benefits

☐ Add Set (for Late Scheduling of Subsequent Certification Appointment)

☐ Replace Set (for Food Prescription Change)

Currently Outstanding Set of Benefits

Select	Actual First Date to	Last Date To Use	Participation Month.
<input checked="" type="checkbox"/>	10/14/2013	10/31/2013	10/2013

Note

Participant received 6 cans of Enfamil from direct ship

☐ Mailing Benefits ☐ Generate Address Label

OK Cancel

Select OK to get to the direct ship screen.

Be sure to check the Direct Ship this Item box and change Ship to In Stock. Then click Finish.

The screenshot shows a software window titled "Direct Shipped Benefit Items". At the top, there is a checkbox labeled "Direct Ship this Item" which is checked and highlighted with a red rectangle. Below this, the "Participant" section contains fields for "State WIC ID" and "Name", both of which are blue. The "Ship to" section has three radio buttons: "Clinic", "Participant", and "In Stock". A red arrow points to the "In Stock" option. To the right of the "Ship to" section is the "Ship to Address" section, which includes fields for "Address", "City", "State", and "ZIP". The "Order" section at the bottom displays "Benefit Period" as "10/01/2013 - 10/31/2013", "Formula" as "12.8 OZ ENFACARE PWD", and "Quantity" as "6". At the bottom of the window are checkboxes for "Print Order" and "Print Receipt", and three buttons: "< Back", "Finish", and "Cancel". A red arrow points up to the "Finish" button.

Direct Shipped Benefit Items

☒ Direct Ship this Item

Participant

State WIC ID Name

Ship to

☐ Clinic

☐ Participant

☒ In Stock

Ship to Address

Address

City

State ZIP

Order

Benefit Period 10/01/2013 - 10/31/2013

Formula 12.8 OZ ENFACARE PWD

Quantity 6

☐ Print Order ☐ Print Receipt

< Back Finish Cancel

Then you will need to capture the participant's signature.

The screenshot shows a Windows-style dialog box titled "Capture Electronic Signature". The dialog has a blue title bar with a close button (X) in the top right corner. The main content area is light gray and contains the following elements:

- A text prompt: "Please capture the authorized signature for the following participants."
- A section titled "Participants and Benefits" with a tree view. The tree has a root node "Participants" (indicated by a folder icon) which is expanded to show a sub-node. This sub-node contains a red person icon, a blue rectangular redaction box, and the text "10/14/2013 - 10/31/2013 Benefits:34238939 - 34238939".
- A text prompt: "This signature indicates that they have received all of the benefits that are listed above."
- A section titled "Authorized Signature" containing a "Signature:" label and a large white rectangular text box for the signature.
- A button labeled "Capture Electronic Signature" located below the signature box.
- At the bottom of the dialog, there are two buttons: "Save Signature" and "Cancel".

When looking at Benefit History you will be able to see that 11 cans of formula were given to the participant.

PF - 8 Months 6 Days - WIC ID:

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History

Demographics	Immunization	HT/WT/Blood	Food Prescription	Risk Factors	Nutrition Assessment
Health Information	Nutrition Education	Referrals	Income History	Benefits History	Appointments

Benefits History

Benefits

- 34238938 FDTU: 10/14/2013 - LDTU: 10/31/2013 Printed FDTU: 10/01/2013 Agency 620 Clinic 03 -- Direct Shipped
5.00 12.8 OZ ENFACARE PWD
- 34238939 FDTU: 10/14/2013 - LDTU: 10/31/2013 Printed FDTU: 10/01/2013 Agency 620 Clinic 03 -- Direct Shipped
6.00 12.8 OZ ENFACARE PWD
- 32386513 FDTU: 08/01/2013 - LDTU: 08/31/2013 Printed FDTU: 08/01/2013 Agency 620 Clinic 03
- 32386514 FDTU: 08/01/2013 - LDTU: 08/31/2013 Printed FDTU: 08/01/2013 Agency 620 Clinic 03
- 31389487 FDTU: 07/01/2013 - LDTU: 07/31/2013 Printed FDTU: 07/01/2013 Agency 620 Clinic 03
- 31389488 FDTU: 07/01/2013 - LDTU: 07/31/2013 Printed FDTU: 07/01/2013 Agency 620 Clinic 03
- 31389485 FDTU: 06/01/2013 - LDTU: 06/30/2013 Printed FDTU: 06/01/2013 Agency 620 Clinic 03
- 31389486 FDTU: 06/01/2013 - LDTU: 06/30/2013 Printed FDTU: 06/01/2013 Agency 620 Clinic 03
- 31389484 FDTU: 05/24/2013 - LDTU: 05/31/2013 Printed FDTU: 05/19/2013 Agency 620 Clinic 03
- 29958440 FDTU: 04/19/2013 - LDTU: 05/18/2013 Printed FDTU: 04/19/2013 Agency 620 Clinic 03
- 29958439 FDTU: 03/20/2013 - LDTU: 04/18/2013 Printed FDTU: 03/19/2013 Agency 620 Clinic 03
- 29308836 FDTU: 02/19/2013 - LDTU: 03/20/2013 Printed FDTU: 02/19/2013 Agency 620 Clinic 03

Print Order Print Receipt Show Details

10/14/2013 4:44 PM

Now let's look at a few scenarios for **Formula given off of the shelf**. We will look at when a participant is receiving only formula, when they are receiving food and formula and when they are receiving formula from stock and a check for the remainder of the formula.

We have a mom who is Partially BF <= Max. We are giving her 4 cans of Gentlease off the shelf for this month. As always, you will need to update the Date Breastfeeding Verified on the Health Info tab.

The screenshot shows the WIC Health Information System (HIS) interface. The title bar indicates the participant is 4 months 17 days old. The main menu includes File, Participant Activities, Certification, Benefit Management, Document Imaging, and Help. The left sidebar shows tabs for Demographics, Immunization, HT/WT/Blood, Food Prescription, Risk Factors, Nutrition Assessment, Certification History, Health Information (selected), Nutrition Education, Referrals, Income History, Benefits History, and Appointments.

The Health Information tab is active, showing the following sections:

- Birth Information:** Includes fields for Unknown Birth Criteria, Birth Height (20 In 4 8ths), Birth Weight (8 Lbs 2 Ozs), Gestation (39 Weeks 5 Days), and Birth Facility (HOSPITAL).
- Mother's Information:** Includes Birth Date (9/5/1977), On WIC checkbox, and State WIC Information (Two-Way Link) with ID and Name fields.
- Feeding Information:** Includes Ever Breastfed (Yes, No, Unknown), Requires Food Package III checkbox, Breastfeeding Now checkbox, Date Food Package III Verified, Date Breastfeeding Verified (10/16/2013), Date Breastfeeding Began (5/29/2013), Date Breastfeeding Ended, Date Supplemental Feeding Began (10/1/2013), Date Solids Were Introduced, Breastfeeding Amount (Partially BF <= Max), and Reason(s) Stopped (Low milk supply, Returned to work or school, Hospital/healthcare provider, Mom met personal goal/personal preference).
- Medical Conditions:** Includes Diabetes Mellitus and Hypertension or Prehypertension checkboxes.

The 'Date Breastfeeding Verified' field is highlighted with a red box. The bottom status bar shows the date and time: 10/16/2013 10:19 AM.

Then you will need to create the Food Rx for 4 cans Gentlease PWD.

The screenshot shows a software window titled "PF - 4 Months 15 Days - WIC ID". The menu bar includes "File", "Participant Activities", "Certification", "Benefit Management", "Document Imaging", and "Help". Below the menu is a toolbar with various icons. A tabbed interface is visible with the following tabs: "Certification History", "Health Information", "Demographics", "Nutrition Education", "Immunization", "Referrals", "HT/WT/Blood", "Income History", "Food Prescription", "Benefits History", "Risk Factors", "Appointments", and "Nutrition Assessment". The "Food Prescription" tab is active, displaying a list of food prescriptions under the heading "Food Prescriptions". The list contains one entry: "Food Prescription for Certification", which is expanded to show two dates: "11/29/2013" and "10/14/2013". Below the dates, the prescription details are listed: "4 - 12.4 OZ OR 12 OZ ENFAMIL GENTLEASE PWD". At the bottom of the window, there are three buttons: "Add...", "Edit...", and "Delete...". The status bar at the bottom right shows the date and time: "10/14/2013 4:57 PM".

Food Prescriptions
<input type="checkbox"/> Food Prescription for Certification
<input type="checkbox"/> 11/29/2013
<input type="checkbox"/> 10/14/2013
4 - 12.4 OZ OR 12 OZ ENFAMIL GENTLEASE PWD

Add... Edit... Delete

10/14/2013 4:57 PM

When you select the issue benefits screen, there should now be a box for Direct Ship.

Issue Benefits - 10/16/2013

Benefits | Food Prescription

Household Member Information

Household Participant	Frequency	Last Set Issued	Last Set PFDT	Last Set LDTU	Prior Certification	Certification Due	Categorical Ineligit
	Bi-monthly	10/1/2013	11/1/2013	11/30/2013	08/02/2013	02/28/2014	06/30/2014
	Bi-monthly	10/1/2013	11/1/2013	11/30/2013	06/04/2013	05/31/2014	05/31/2014
	Tri-monthly			1/3/2010	11/04/2009	12/31/2009	12/31/2009
	Bi-monthly			1/18/2009	04/07/2008	10/07/2008	12/31/2008
	Bi-monthly			10/4/2012	06/11/2012	09/30/2012	09/30/2012

/2013 Full
/2013 Full
☒ 10/16/2013-10/31/2013 Full
☐ Direct Ship - 12.4 OZ OR 12 OZ ENFAMIL GENTLEASE PwD

Cycle Adjustment Type
☒ System Determined ☐ Selected LDTU of: (none)

☐ Mailing Benefits ☐ Generate Address Label

Since we are giving the participant cans of formula we have to check the Direct Ship box.

Issue Benefits - 10/16/2013

Benefits | Food Prescription

Household Member Information

Household Participant	Frequency	Last Set Issued	Last Set PFD	Last Set LDTU	Prior Certification	Certification Due	Categorical Ineligit
[Redacted]	Bi-monthly	10/1/2013	11/1/2013	11/30/2013	08/02/2013	02/28/2014	06/30/2014
	Bi-monthly	10/1/2013	11/1/2013	11/30/2013	06/04/2013	05/31/2014	05/31/2014
	Tri-monthly			1/3/2010	11/04/2009	12/31/2009	12/31/2009
	Bi-monthly			1/18/2009	04/07/2008	10/07/2008	12/31/2008
	Bi-monthly			10/4/2012	06/11/2012	09/30/2012	09/30/2012

[Redacted] 2013 Full

[Redacted] 2013 Full

[X] 10/16/2013-10/31/2013 Full

[X] Direct Ship 12.4 OZ OR 12 OZ ENFAMIL GENTLEASE PwD

Cycle Adjustment Type

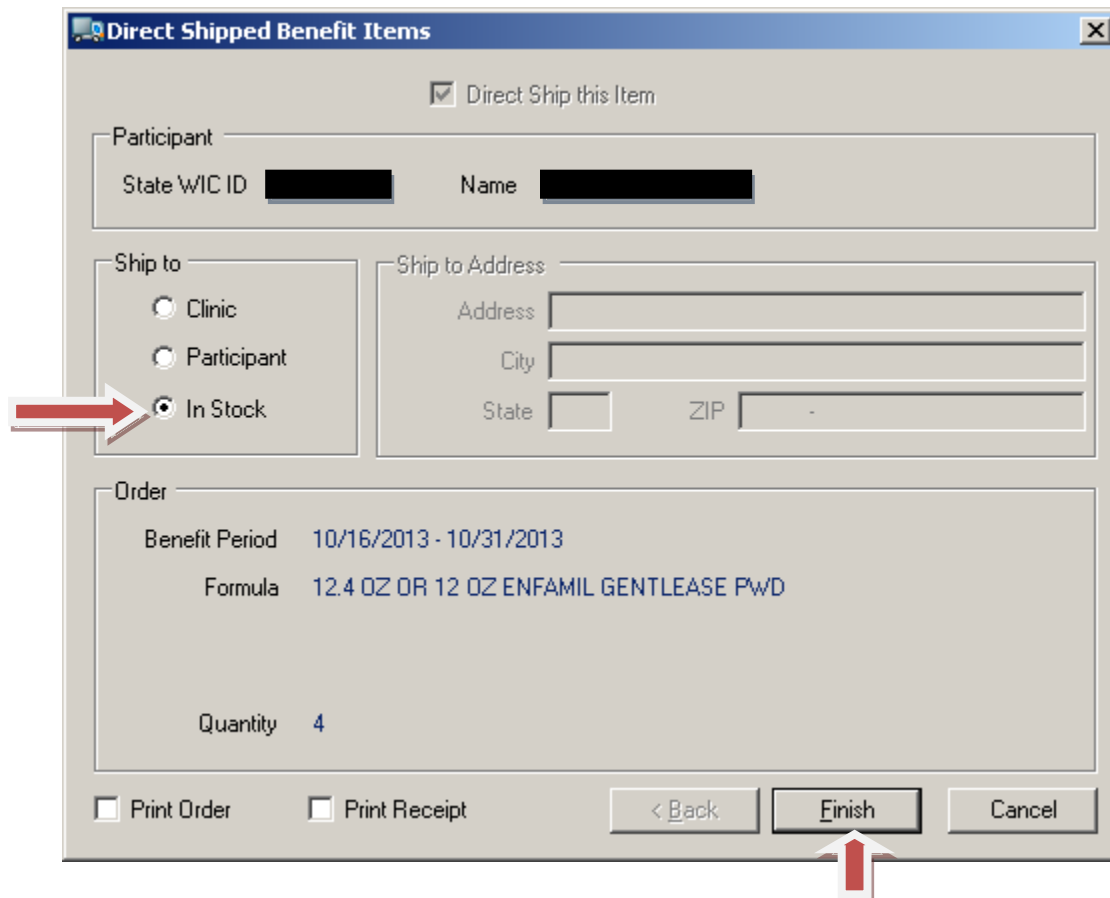
☒ System Determined ☐ Selected LDTU of: (none)

Preview Benefits Edit First Set

☐ Mailing Benefits ☐ Generate Address Label

Issue Benefits to Selected Members Cancel

After Previewing Benefits, select to Issue Benefits to Selected Members to get to the Direct Ship screen.



The screenshot shows a software window titled "Direct Shipped Benefit Items". At the top, there is a checkbox labeled "Direct Ship this Item" which is checked. Below this, there are two input fields: "State WIC ID" and "Name", both containing blacked-out text. The "Ship to" section contains three radio buttons: "Clinic", "Participant", and "In Stock". A red arrow points to the "In Stock" radio button, which is selected. To the right of the "Ship to" section is the "Ship to Address" section, which includes fields for "Address", "City", "State", and "ZIP". The "Order" section displays the following information: "Benefit Period" as "10/16/2013 - 10/31/2013", "Formula" as "12.4 OZ OR 12 OZ ENFAMIL GENTLEASE PWD", and "Quantity" as "4". At the bottom of the window, there are two checkboxes: "Print Order" and "Print Receipt", both of which are unchecked. To the right of these checkboxes are three buttons: "< Back", "Finish", and "Cancel". A red arrow points to the "Finish" button.

Be sure to check In Stock on the Ship to and then click Finish.

The participant Must sign that they received the cans of formula.

The screenshot shows a Windows-style dialog box titled "Capture Electronic Signature". The main text inside says "Please capture the authorized signature for the following participants." Below this is a section titled "Participants and Benefits" which contains a list box. The list box has a tab labeled "Participants" and shows a single entry with a person icon, a redacted name, a date range "10/16/2013 - 10/31/2013", and a benefit range "Benefits:34385138 - 34385138". Below the list box, a note states: "This signature indicates that they have received all of the benefits that are listed above." Underneath the note is a section titled "Authorized Signature" containing a label "Signature:" and a large empty rectangular box for the signature. Below the signature box is a button labeled "Capture Electronic Signature". At the bottom of the dialog are two buttons: "Save Signature" and "Cancel".

Capture Electronic Signature

Please capture the authorized signature for the following participants.

Participants and Benefits

Participants

[Person Icon] [Redacted Name] 10/16/2013 - 10/31/2013 Benefits:34385138 - 34385138

This signature indicates that they have received all of the benefits that are listed above.

Authorized Signature

Signature: [Empty Signature Box]

Capture Electronic Signature

Save Signature Cancel

When viewing the Benefit History we can see the item shows as Direct shipped.

The screenshot shows a software window titled "PF - 4 Months 17 Days - WIC ID: [REDACTED]". The interface includes a menu bar with "File", "Participant Activities", "Certification", "Benefit Management", "Document Imaging", and "Help". Below the menu is a toolbar with various icons. A tabbed interface is present with tabs for "Demographics", "Immunization", "HT/WT/Blood", "Food Prescription", "Risk Factors", "Nutrition Assessment", "Certification History", "Health Information", "Nutrition Education", "Referrals", "Income History", "Benefits History" (which is selected), and "Appointments".

The "Benefits History" section displays a list of benefits. The first item is expanded, showing a tree structure:

- Benefits
 - 34385138 FDTU: 10/16/2013 - LDTU: 10/31/2013 Printed FDTU: 10/16/2013 Agency 620 Clinic 03 -- Direct Shipped
 - 4.00 12.4 OZ OR 12 OZ ENFAMIL GENTLEASE PwD

A large red arrow points to the text "Direct Shipped" in the first item of the list. At the bottom of the window, there are buttons for "Print Order", "Print Receipt", and "Show Details". The status bar at the bottom right shows the date and time: "10/16/2013 10:30 AM".

Next we will look at the scenario where we have a 6 month old participant who receives formula and food. We have the 7 cans of Enfamil Premium on our shelf.

The first thing to do is verify the Date BF verified

PF - 6 Months 19 Days - WIC ID: [REDACTED]

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History

Demographics	Immunization	HT/WT/Blood	Food Prescription	Risk Factors	Nutrition Assessment
Health Information	Nutrition Education	Referrals	Income History	Benefits History	Appointments

Birth Information

Unknown Birth Criteria ☐

Birth Height 20 In 4 8ths Birth Weight 8 Lbs 7 Ozs

Gestation Weeks 39 Weeks 1 Days

Birth Facility HOSPITAL

Mother's Information

Birth Date 10/5/1983 ☒ On WIC State WIC Information **Two-Way Link**

ID [REDACTED] Name [REDACTED]

Feeding Information

Ever Breastfed

☒ Yes ☐ No ☐ Unknown

☐ Requires Food Package III

☐ Breastfeeding Now

Date Food Package III Verified [REDACTED]

Breastfeeding Amount Not Applicable

Reason(s) Stopped

- Low milk supply
- Returned to work or school
- Hospital/healthcare provider
- Mom met personal goal/personal preference

Date Breastfeeding Verified 10/16/2013

Date Breastfeeding Began 3/27/2013

Date Breastfeeding Ended 5/15/2013

Date Supplemental Feeding Began 5/12/2013

Date Solids Were Introduced [REDACTED]

Medical Conditions

☐ Diabetes Mellitus ☐ Hypertension or Prehypertension

10/16/2013 10:56 AM

Create the Food Rx.

PF - 6 Months 19 Days - WIC ID:

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History Health Information Nutrition Education Referrals Income History Benefits History Appointments Demographics Immunization HT/WT/Blood Food Prescription Risk Factors Nutrition Assessment

Food Prescriptions

- Food Prescription for Certification
 - 03/27/2014
 - 10/16/2013
 - 24 - OUNCES INFANT CEREAL- APPROVED BRANDS
 - 7 - 12.5 OZ ENFAMIL PREMIUM INFANT PWD
 - 32 - 4 OZ INFANT FRUITS/VEGGIES APPROVED BRANDS/VARIETIES ONLY
 - 09/27/2013
 - 07/27/2013
 - 06/04/2013

Add... Edit... Delete

10/16/2013 10:56 AM

Then you can Issue Benefits.

As you can see below the participant is receiving Bi-Monthly Checks, and both sets are checked. Since we are only giving them 7 cans of formula for the current month we will only select direct ship for the current set

Issue Benefits - 10/16/2013

Benefits | Food Prescription

Household Member Information

Household Participant	Frequency	Last Set Issued	Last Set PFDT	Last Set LDTU	Prior Certification	Certification Due	Categorical Ineligibility
[Redacted]	Bi-monthly	8/13/2013	10/1/2013	10/31/2013	08/13/2013	02/28/2014	07/31/2016
[Redacted]	Bi-monthly	8/13/2013	10/1/2013	10/31/2013	03/29/2013	03/31/2014	03/31/2018
[Redacted]	Bi-monthly			09/30/2013	03/29/2013	09/30/2013	09/30/2013

- ☒ [Redacted]
 - ☒ [Redacted]
 - ☒ 11/1/2013-11/30/2013 Full
 - ☐ Direct Ship - 12.5 OZ ENFAMIL PREMIUM INFANT PwD
 - ☒ 12/1/2013-12/31/2013 Full
 - ☐ Direct Ship - 12.5 OZ ENFAMIL PREMIUM INFANT PwD

Cycle Adjustment Type

☒ System Determined ☐ Selected LDTU of [none]

Preview Benefits Edit First Set

☐ Mailing Benefits ☐ Generate Address Label

Issue Benefits to Selected Members Cancel

You will only check the Direct Ship for the current set.

Issue Benefits - 10/16/2013

Benefits | Food Prescription

Household Member Information

Household Participant	Frequency	Last Set Issued	Last Set PFD	Last Set LDTU	Prior Certification	Certification Due	Categorical Ineligibility
	Bi-monthly	8/13/2013	10/1/2013	10/31/2013	08/13/2013	02/28/2014	07/31/2016
	Bi-monthly	8/13/2013	10/1/2013	10/31/2013	03/29/2013	03/31/2014	03/31/2018
	Bi-monthly			09/30/2013	03/29/2013	09/30/2013	09/30/2013

Cycle Adjustment Type

☒ System Determined ☐ Selected LDTU of (none)

☐ Mailing Benefits ☐ Generate Address Label

Household Member Information

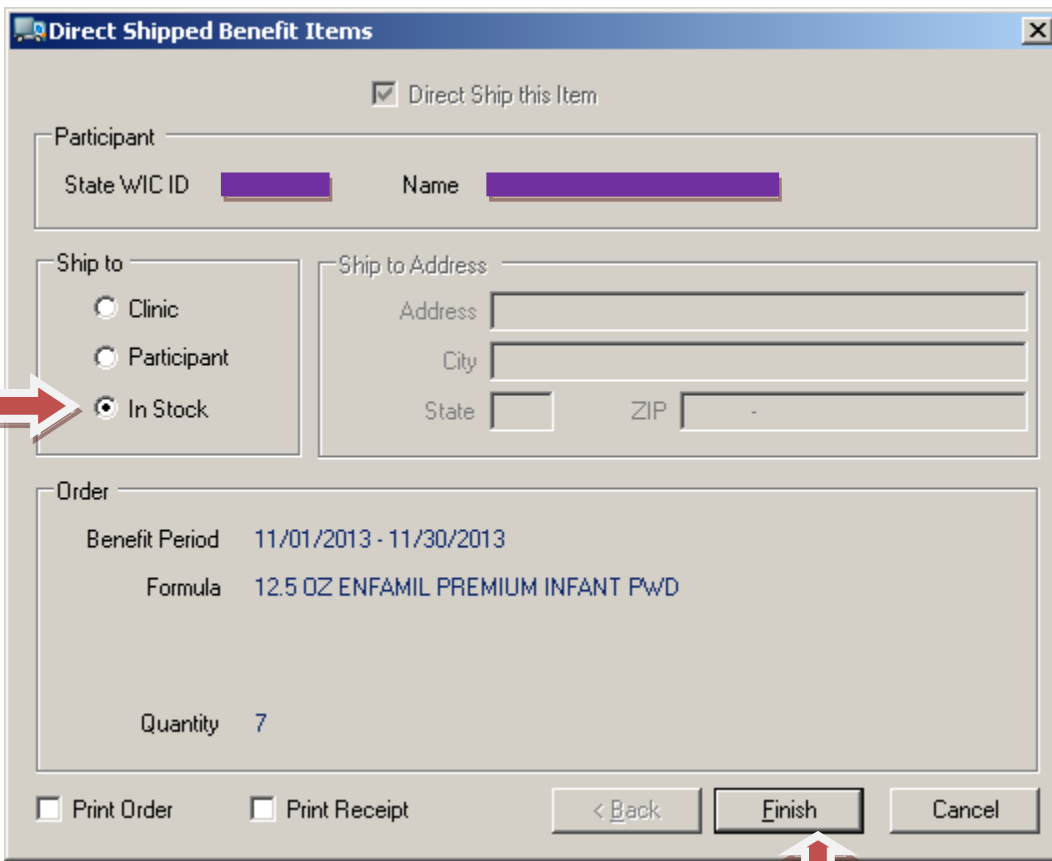
11/1/2013-11/30/2013 Full

☒ Direct Ship - 12.5 OZ ENFAMIL PREMIUM INFANT PWD

12/1/2013-12/31/2013 Full

☐ Direct Ship - 12.5 OZ ENFAMIL PREMIUM INFANT PWD

After Previewing Benefits select to Issue Benefits to Selected Members to receive the Direct Ship Screen.



The image shows a software window titled "Direct Shipped Benefit Items". At the top, there is a checkbox labeled "Direct Ship this Item" which is checked. Below this, there are two input fields: "State WIC ID" and "Name", both containing redacted information. The "Ship to" section contains three radio buttons: "Clinic", "Participant", and "In Stock". A red arrow points to the "In Stock" radio button, which is selected. To the right of the "Ship to" section is the "Ship to Address" section, which includes fields for "Address", "City", "State", and "ZIP". The "Order" section displays the "Benefit Period" as "11/01/2013 - 11/30/2013", the "Formula" as "12.5 OZ ENFAMIL PREMIUM INFANT PWD", and the "Quantity" as "7". At the bottom, there are checkboxes for "Print Order" and "Print Receipt", and three buttons: "< Back", "Finish", and "Cancel". A red arrow points to the "Finish" button.

☒ Direct Ship this Item

Participant

State WIC ID [redacted] Name [redacted]

Ship to

☐ Clinic

☐ Participant

☒ In Stock

Ship to Address

Address [redacted]

City [redacted]

State [redacted] ZIP [redacted]

Order

Benefit Period 11/01/2013 - 11/30/2013

Formula 12.5 OZ ENFAMIL PREMIUM INFANT PWD

Quantity 7

☐ Print Order ☐ Print Receipt

< Back Finish Cancel

Be sure to select In Stock on the Ship to. Then click Finish.







Next have the participant sign for the checks AND the cans of formula.

Capture Electronic Signature

Please capture the authorized signature for the following participants.

Participants and Benefits

Participants

-   4385139 - 34385143
4385144 - 34385148
-  
-  11/01/2013 - 11/30/2013 Benefits: 34385149 - 34385151
-  12/01/2013 - 12/31/2013 Benefits: 34385152 - 34385155

This signature indicates that they have received all of the benefits that are listed above.

Authorized Signature

Signature:

When we view the Benefit History we can see checks were created for the food items and that the formula was direct shipped.

PF - - 6 Months 19 Days - WIC ID: [REDACTED]

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History Demographics Immunization HT/WT/Blood Food Prescription Risk Factors Nutrition Assessment Health Information Nutrition Education Referrals Income History Benefits History Appointments

Benefits History

Benefits

- 34385152 FDTU: 12/01/2013 - LDTU: 12/31/2013 Printed FDTU: 12/01/2013 Agency 620 Clinic 03
 - 24.00 OUNCES INFANT CEREAL - APPROVED BRANDS
 - 16.00 4 OZ INFANT FRUITS/VEGGIES APPROVED BRANDS/VARIETIES ONLY
- 34385153 FDTU: 12/01/2013 - LDTU: 12/31/2013 Printed FDTU: 12/01/2013 Agency 620 Clinic 03
- 34385154 FDTU: 12/01/2013 - LDTU: 12/31/2013 Printed FDTU: 12/01/2013 Agency 620 Clinic 03
- 34385155 FDTU: 12/01/2013 - LDTU: 12/31/2013 Printed FDTU: 12/01/2013 Agency 620 Clinic 03
- 34385149 FDTU: 11/01/2013 - LDTU: 11/30/2013 Printed FDTU: 11/01/2013 Agency 620 Clinic 03
 - 24.00 OUNCES INFANT CEREAL - APPROVED BRANDS
 - 16.00 4 OZ INFANT FRUITS/VEGGIES APPROVED BRANDS/VARIETIES ONLY
 - 16.00 4 OZ INFANT FRUITS/VEGGIES APPROVED BRANDS/VARIETIES ONLY
 - 34385151 FDTU: 11/01/2013 - LDTU: 11/30/2013 Printed FDTU: 11/01/2013 Agency 620 Clinic 03 -- Direct Shipped
 - 7.00 12.5 OZ ENFAMIL PREMIUM INFANT PwD
- 33026074 FDTU: 10/01/2013 - LDTU: 10/31/2013 Printed FDTU: 10/01/2013 Agency 620 Clinic 03
- 33026073 FDTU: 10/01/2013 - LDTU: 10/31/2013 Printed FDTU: 10/01/2013 Agency 620 Clinic 03
- 33026072 FDTU: 10/01/2013 - LDTU: 10/31/2013 Printed FDTU: 10/01/2013 Agency 620 Clinic 03
- 33026071 FDTU: 10/01/2013 - LDTU: 10/31/2013 Printed FDTU: 10/01/2013 Agency 620 Clinic 03
- 33026070 FDTU: 09/01/2013 - LDTU: 09/30/2013 Printed FDTU: 09/01/2013 Agency 620 Clinic 03
- 33026069 FDTU: 09/01/2013 - LDTU: 09/30/2013 Printed FDTU: 09/01/2013 Agency 620 Clinic 03
- 32145112 FDTU: 08/01/2013 - LDTU: 08/31/2013 Printed FDTU: 08/01/2013 Agency 620 Clinic 03
- 32145111 FDTU: 08/01/2013 - LDTU: 08/31/2013 Printed FDTU: 08/01/2013 Agency 620 Clinic 03
- 32145110 FDTU: 07/02/2013 - LDTU: 07/31/2013 Printed FDTU: 07/02/2013 Agency 620 Clinic 03
- 32145109 FDTU: 07/02/2013 - LDTU: 07/31/2013 Printed FDTU: 07/02/2013 Agency 620 Clinic 03
- 31534740 FDTU: 06/04/2013 - LDTU: 07/01/2013 Printed FDTU: 06/04/2013 Agency 620 Clinic 03

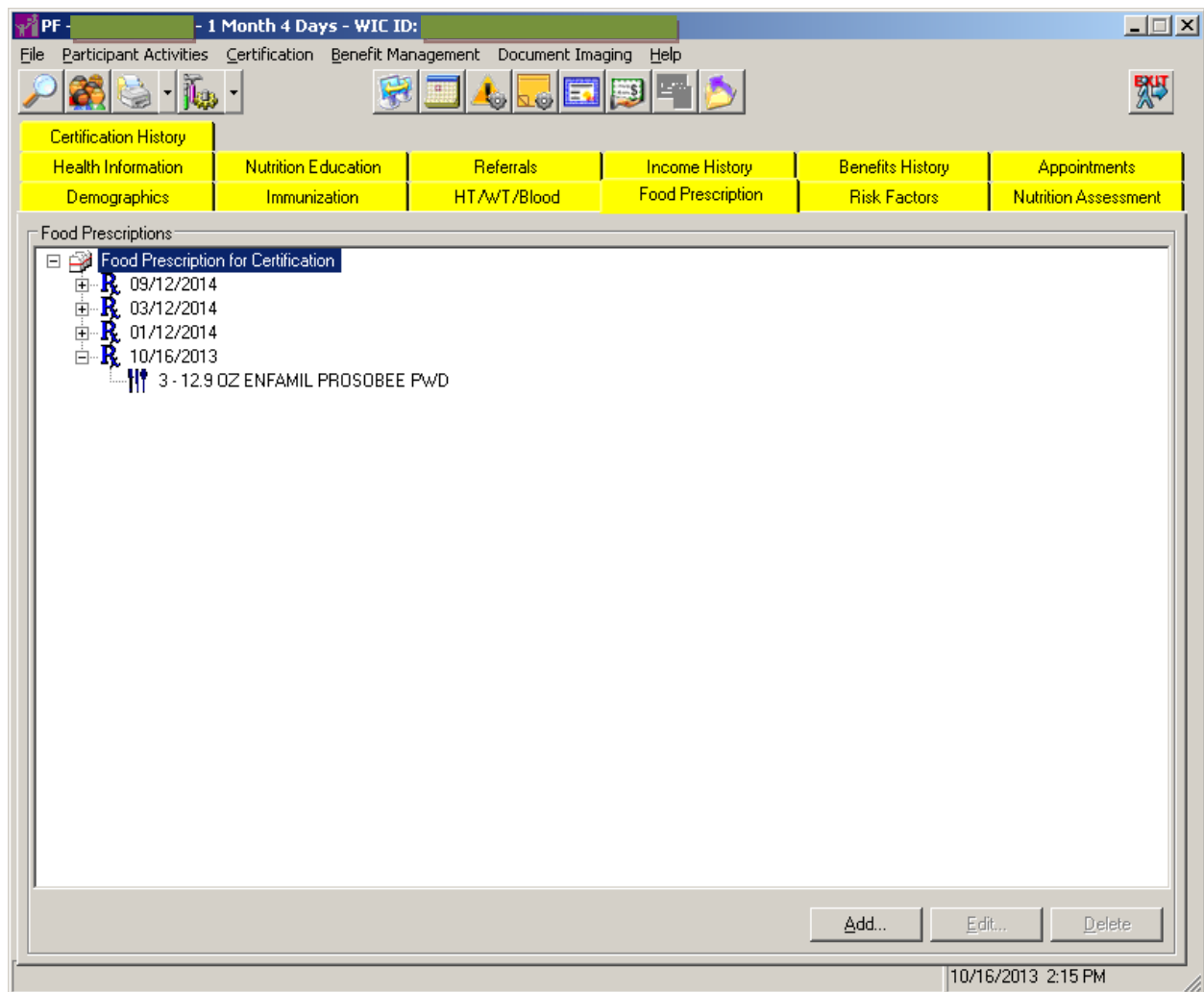
Print Order Print Receipt Show Details

10/16/2013 11:08 AM

The **Last scenario** we will look at is giving a participant a check for some of the formula and the remainder of the formula is given out of inventory. The participant is to receive a total of 4 cans of Enfamil Prosobee, we are giving 1 can out of inventory and a check for 3 cans.

In this case, we will create a Food Rx for 3 cans in order to print a check for the mom, and then edit the Food Rx for the 1 can off of the shelf.

A Food Rx with 3 cans of formula for a check has been added.



Now you will issue benefits. Since we are issuing a check for the 3 cans we will NOT check the direct ship box.

Issue Benefits - 10/16/2013

Benefits | Food Prescription

Household Member Information

Household Participant	Frequency	Last Set Issued	Last Set PFD T	Last Set LDTU	Prior Certification	Certification Due	Categorical Ineligibility
[REDACTED]	Bi-monthly	10/11/2013	11/1/2013	11/30/2013	09/13/2013	09/30/2014	09/30/2014
	Monthly				09/13/2013	09/30/2014	09/30/2018

2/31/2013 Full

☒ 10/16/2013-10/31/2013 Full

☐ Direct Ship - 12.9 OZ ENFAMIL PROSOBEE PWD

Cycle Adjustment Type

☒ System Determined ☐ Selected LDTU of (none)

Preview Benefits Edit First Set

☐ Mailing Benefits ☐ Generate Address Label

Issue Benefits to Selected Members Cancel



After Previewing Benefits mom will sign for the check she received.

The image shows a software window titled "Capture Electronic Signature". Inside, there is a section labeled "Participants and Benefits" which contains a tree view with a "Participants" folder. Under this folder, there is a red stick figure icon, a green rectangular bar, and a text entry "10/16/2013 - 10/31/2013 Benefits:34385156 - 34385156". Below this section, a text label states: "This signature indicates that they have received all of the benefits that are listed above." Underneath this is a large rectangular area labeled "Authorized Signature" with the text "Signature:" inside. At the bottom of this area is a button labeled "Capture Electronic Signature". At the very bottom of the window are two buttons: "Save Signature" and "Cancel".

Capture Electronic Signature

Please capture the authorized signature for the following participants.

Participants and Benefits

- Participants
 -   10/16/2013 - 10/31/2013 Benefits:34385156 - 34385156

This signature indicates that they have received all of the benefits that are listed above.

Authorized Signature

Signature:

Capture Electronic Signature

Save Signature Cancel

When viewing Benefit History we can see that a check for 3 cans was created

PF - 1 Month 4 Days - WIC ID: [redacted]

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History Demographics Immunization HT/WT/Blood Food Prescription Risk Factors Nutrition Assessment Health Information Nutrition Education Referrals Income History Benefits History Appointments

Benefits History

- Benefits
 - 34385156 FDTU: 10/16/2013 - LDTU: 10/31/2013 Printed FDTU: 10/16/2013 Agency 620 Clinic 03
 - 3.00 12.9 OZ ENFAMIL PROSOBEE PWD

Print Order Print Receipt Show Details

10/16/2013 2:21 PM

Now we need to Edit the current Food Rx to show 1 can to count for the 1 can we are giving out of inventory.

The screenshot shows a software window titled "PF - 1 Month 4 Days - WIC ID:". The window has a menu bar with "File", "Participant Activities", "Certification", "Benefit Management", "Document Imaging", and "Help". Below the menu bar is a toolbar with various icons. A yellow tabbed interface is visible, with tabs for "Certification History", "Health Information", "Demographics", "Nutrition Education", "Immunization", "Referrals", "HT/A/T/Blood", "Income History", "Food Prescription", "Benefits History", "Risk Factors", "Appointments", and "Nutrition Assessment". The "Food Prescription" tab is currently selected. Below the tabs, the "Food Prescriptions" section is displayed. It contains a list of food prescriptions for certification, each with a date and a description. The date "10/16/2013" is highlighted in blue. The description for this date is "1 - 12.9 OZ ENFAMIL PROSOBEE PwD". At the bottom of the window, there are three buttons: "Add...", "Edit...", and "Delete". The status bar at the bottom right shows the date and time: "10/16/2013 2:23 PM".

Food Prescription for Certification
09/12/2014
03/12/2014
01/12/2014
10/16/2013
1 - 12.9 OZ ENFAMIL PROSOBEE PwD

Buttons: Add... Edit... Delete

Status: 10/16/2013 2:23 PM

Next we will go to the Benefit Management menu and select Add/Replace to issue the 1 can.

We will select the Replace option and check the correct set of Benefits. You also need to make a Note explaining what has happened. When making a note in Add/Replace it is automatically put into General Notes. When ready we click the OK.

Add/Replace Set of Benefits

☐ Add Set (for Late Scheduling of Subsequent Certification Appointment)

☐ Replace Set (for Food Prescription Change)

Edit Food Prescription

An additional set of benefits cannot be issued to this participant because valid benefits are still available for the participant through Issue Benefits.

Currently Outstanding Set of Benefits

Select	Actual First Date to	Last Date To Use	Participation Month.
<input checked="" type="checkbox"/>	10/16/2013	10/31/2013	10/2013

Note

Issued 1 can of formula from stock on 10/16/13

☐ Mailing Benefits ☐ Generate Address Label

OK Cancel

NOTE- When making a Note on the Replace set of benefits screen it can be viewed in General notes as shown below.

Manage Notes

Display

☒ SOAP Notes

☒ General Notes

☒ BF Notes

☒ System Notes

Refresh

Notes for Household Member

Note Type	Date Created	Application Area	Staff Member
General	10/16/2013	Benefits History	WMOCMTA
General	10/11/2013	Nutrition Education	MCBRIC2
SOAP	09/13/2013	Demographics	CASTLJ

Selected Note Text

Issued 1 can of formula from stock on 10/16/13

Full Page View

Create SOAP Note

Create General Note

Create BF Note

Print Note

Close

After clicking OK the Direct Shipped Benefit Items screen displays. Be sure to check the Direct Ship this Item box, and to select In stock in the Ship to.

Direct Shipped Benefit Items

☒ Direct Ship this Item

Participant

State WIC ID Name

Ship to

☐ Clinic
☐ Participant
☒ In Stock

Ship to Address

Address
City
State ZIP

Order

Benefit Period 10/16/2013 - 10/31/2013
Formula 12.9 OZ ENFAMIL PROSOBEE PwD
Quantity 1

☐ Print Order ☐ Print Receipt

< Back Finish Cancel

Click on Finish.

Then have the participant sign for the can of formula.

The screenshot shows a software window titled "Capture Electronic Signature". Inside, there is a section labeled "Participants and Benefits" which contains a tree view with a "Participants" folder. Under this folder, a participant is listed with a red person icon, a green bar, and the text "10/16/2013 - 10/31/2013 Benefits:34385158 - 34385158". Below this section, a message states: "This signature indicates that they have received all of the benefits that are listed above." Further down, there is an "Authorized Signature" section with a "Signature:" label and a large white rectangular box for the signature. A "Capture Electronic Signature" button is positioned below the signature box. At the bottom of the window, there are two buttons: "Save Signature" and "Cancel".

Capture Electronic Signature

Please capture the authorized signature for the following participants.

Participants and Benefits

- Participants
 - 10/16/2013 - 10/31/2013 Benefits:34385158 - 34385158

This signature indicates that they have received all of the benefits that are listed above.

Authorized Signature

Signature: [Signature Box]

Capture Electronic Signature

Save Signature Cancel

Now we can look at the Benefit History and see a check for 3 cans and a Direct Ship of 1 can to equal our total of 4 cans.

PF - 1 Month 4 Days - WIC ID: [REDACTED]

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History Demographics Immunization HT/WT/Blood Food Prescription Risk Factors Nutrition Assessment Health Information Nutrition Education Referrals Income History Benefits History Appointments

Benefits History

- 34385156 FDTU: 10/16/2013 - LDTU: 10/31/2013 Printed FDTU: 10/16/2013 Agency 620 Clinic 03
 - 3.00 12.9 OZ ENFAMIL PROSOBEE PWD
- 34385157 FDTU: 10/16/2013 - LDTU: 10/31/2013 Printed FDTU: 10/16/2013 Agency 620 Clinic 03 VOIDED 10/16/2013
- 34385158 FDTU: 10/16/2013 - LDTU: 10/31/2013 Printed FDTU: 10/16/2013 Agency 620 Clinic 03 -- Direct Shipped
 - 1.00 12.9 OZ ENFAMIL PROSOBEE PWD

Print Order Print Receipt Show Details

10/16/2013 2:30 PM

The next step is to update the Food Rx to show a total of 4 cans since all formula was issued today.

If the formula is issued on 2 different days you do not need to update the Food Rx to show the total.

PF - 1 Month 4 Days - WIC ID:

File Participant Activities Certification Benefit Management Document Imaging Help

Certification History

Health Information Nutrition Education Referrals Income History Benefits History Appointments

Demographics Immunization HT/WT/Blood Food Prescription Risk Factors Nutrition Assessment

Food Prescriptions

Food Prescription for Certification

- 09/12/2014
- 03/12/2014
- 01/12/2014
- 10/16/2013

4 - 12.9 OZ ENFAMIL PROSOBEE PwD

Add... Edit... Delete

10/16/2013 2:32 PM

Questions?